BOWDITCH

www.bowditch.com

ASSOCIATE

Zachary M. Chupak

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OVERVIEW

Zachary Chupak is an Associate in the Estate, Financial & Tax Planning Practice Area. He assists high-net worth individuals and families in need of asset protection, business succession planning and gift and estate tax strategies. Multi-generational and blended families seek Zach's assistance with estate planning, estate administration, probate and tax litigation, and family office needs.

Working with clients throughout New England and the U.S., Zach oversees both public and private investments, including investments with various private equity funds, hedge fund and other alternative investment entities. He also helps clients establish and maintain private foundations, including tax compliance.

Before Bowditch

Prior to receiving his law degree, Zach was an indigenous law legal researcher and a physics and math tutor. He earned his bachelor's degree in biophysics and minored in math.

Besides Work

An Eagle Scout, Zach enjoys troubleshooting and problem-solving and taught himself how to build computers. He's also an avid skier and enjoys checking out mountains across the country.

EXPERIENCE

Tax and wealth management

- Assisted business owners in developing and implementing tax efficient succession plans and exit strategies
- Management of charitable foundations to maximize the tax benefits of charitable giving
- Aid multiple generations of client families in coordinating tax and wealth management strategies to benefit future generations

Estate planning and administration

- Advises and guides Trustees and Personal Representatives through the probate process and completion of federal and state estate tax returns

 | BOSTON | FRAMINGHAM | WORCESTER

- Advises and implements administration of a 9-figure family trust that was previously handled by a large bank
- Administration of a $25M+ estate
- Designed and implemented a full estate plan for a high-net-worth couple changing their domicile to Florida
- Designs complex estate plans for LGBTQ+ families and other non-traditional family structures

Business planning and counsel

- Works with various wealth management institutions to provide integrated investment, financial planning and estate planning advice to clients regarding their personal assets and retirement accounts, including assuming responsibility for funding their revocable trusts to avoid probate and serving as counsel to their trustees
- Corporate executives to structure and implement plans to benefit both family members and philanthropic interests
- Physicians in connection with practice structure, estate planning and individual planning, including the creation and management of trusts
- Creates limited partnerships, limited liability companies, corporations and trusts, in addition to acting as counsel to their fiduciary officers, in order to achieve asset protection, privacy and wealth preservation purposes
- Drafting complex loan agreements for various business and personal purposes

AFFILIATIONS

- Member, Boston Bar Association

BAR ADMISSIONS

- Massachusetts

EDUCATION

- J.D., Michigan State University College of Law
- B.S., Eckerd College

